

# CCTO Glossary

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## TOPICS



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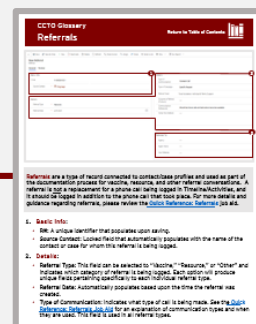
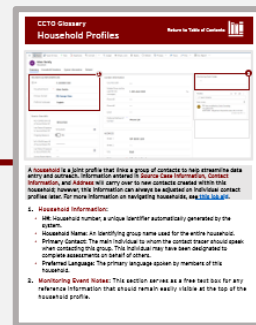
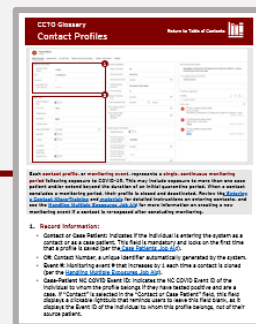
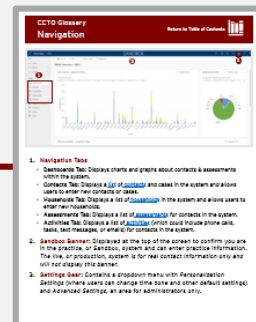
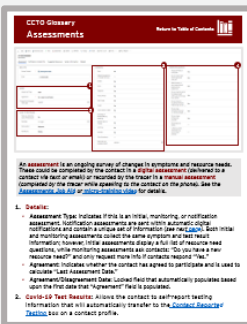
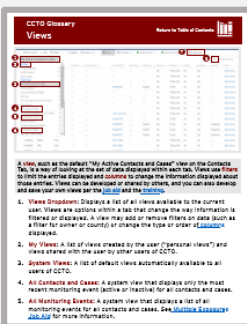
### Household Profiles

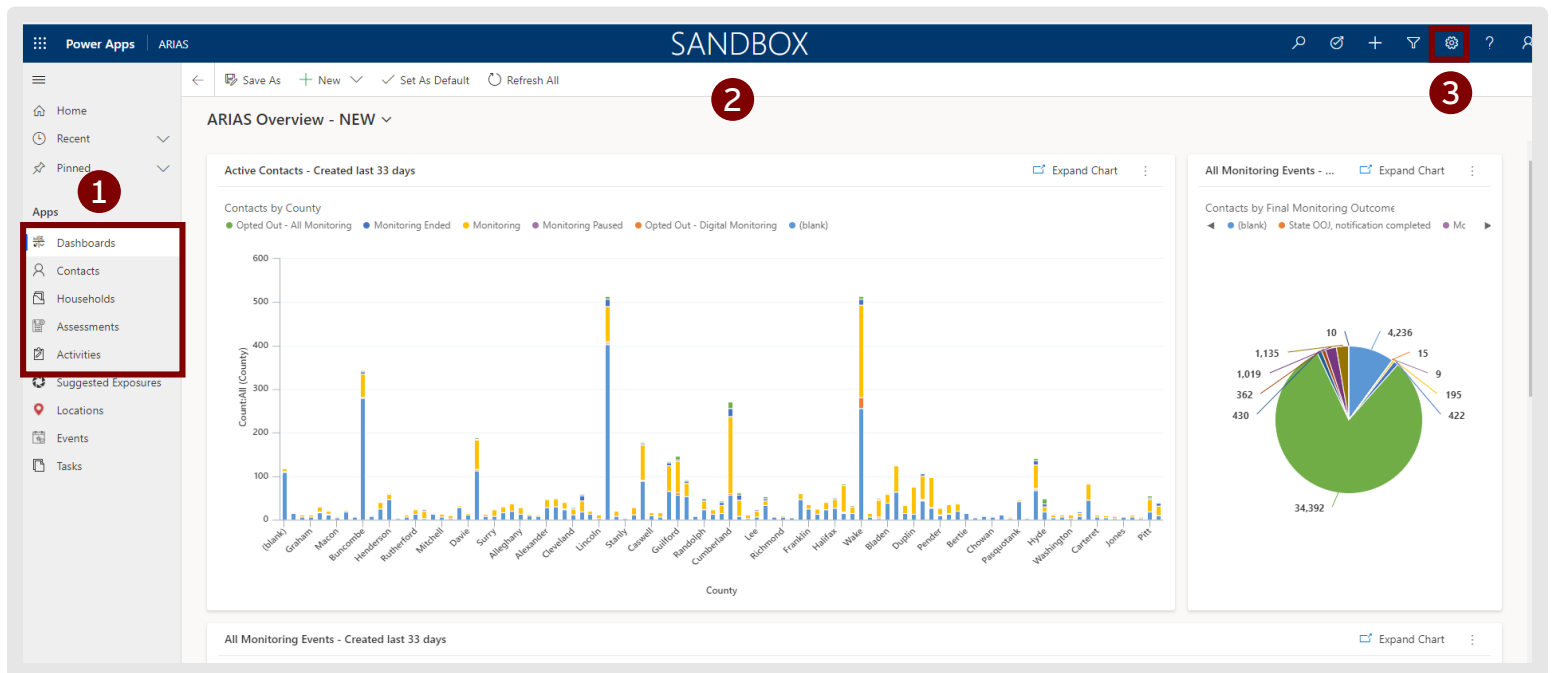


### Assessments



### Referrals





## 1. Navigation Tabs

- **Dashboards Tab:** Displays charts and graphs about contacts & assessments within the system.
- **Contacts Tab:** Displays a list of contacts and cases in the system and allows users to enter new contacts or cases.
- **Households Tab:** Displays a list of households in the system and allows users to enter new households.
- **Assessments Tab:** Displays a list of assessments for contacts in the system.
- **Activities Tab:** Displays a list of activities (which could include phone calls, tasks, text messages, or emails) for contacts in the system.

2. **Sandbox Banner:** Displayed at the top of the screen to confirm you are in the practice, or Sandbox, system and can enter practice information. *The live, or production, system is for real contact information only and will not display this banner.*

3. **Settings Gear:** Contains a dropdown menu with *Personalization Settings* (where users can change time zone and other default settings) and *Advanced Settings*, an area for administrators only.



The screenshot shows the 'Contacts' tab in a Power Apps application. The interface includes a left-hand navigation pane with options like Home, Recent, Pinned, Apps, Dashboards, Contacts (selected), Households, Assessments, Activities, Suggested Exposures, Locations, Events, and Tasks. The main area displays a table titled 'My Active Contacts & Cases' with columns for Last Name, First Name, Household, Mobile Phone, Monitoring, Preferred Language, Preferred Gender, Is Minor, Is Student, School Name, Owner, Last Assessment, Last Date of Onset, Monitoring Status, and Created On. The table lists various contacts such as Andrews, Banks, Blank, Brady, Brown, Glass, Lightyear, Penn, Piggy, Plum, Says, Sink, and Smith. Numbered callouts indicate: 1. The view title 'My Active Contacts & Cases'; 2. The 'Deactivate' button; 3. The 'Assign' button; 4. The column headers; and 5. The search bar.

- 1. My Active Contacts and Cases View:** Default [view](#) that displays all of the active contacts and cases assigned to the current user. Can be changed to show various other sets of information.
- 2. Deactivate Button:** Appears upon selecting profile(s). Deactivates (but does *not* delete) the selected profile. This will put this profile into an inactive status, removing them from the user's "My Active Contacts and Cases" view. A contact should be deactivated after their monitoring period has ended.
- 3. Assign Button:** Appears upon selecting profile(s). Changes the owner of a contact to a different user or team. This will remove the contact from the first user's "My Active Contacts and Cases" view and place it in a different user's "My Active Contacts and Cases" view.
- 4. Columns:** Categories of information about each profile that can be sorted or filtered by clicking each caret (down arrow). These columns can be changed and customized by creating a custom view [per the job aid](#).
- 5. Search:** Used to search within the current [view](#) by contact name, C#, address, etc.



**Thum Belina**  
Contact

ARIAS Contact Assessments All Activities Recent Monitoring History System Information Related

**Record Information**

Contact or Case Patient: Contact

C#: C-0000063234

Event #: 1

Case-Patient NC-COVID Event ID: [Lightbulb icon]

**Basic Info**

Priority Contact or Case: ☐ No

First Name: \* Thum

Middle Name: ---

Last Name: \* Belina

Preferred Name: ---

Date of Birth (DOB): \* 2/18/2000

Fake DOB: ☐ No

Is Minor: ☐ No

Household: ---

Household Relationship: ---

Requires Proxy: ☐ No

**Monitoring Details**

Begin Monitoring?: Yes

Monitoring Status: Monitoring

Monitoring End Date: 3/9/2021

Final Monitoring Outcome: \* Monitored in Other System

Monitoring Age: 25

Begin Monitoring Date: 2/25/2021

Last Assessment Date: 2/25/2021 2:43 PM

First Date Symptoms Reported: ---

Most Recent Date Resource Need Reported: ---

**Source Case Information**

Ongoing Exposure: ☐ No

NC-COVID Event ID of Source Patient #1 (Use the number): 123445566

Last Date of Exposure to Source Patient #1: 2/23/2021

NC-COVID Event ID of Source Patient #2 (Use the number): ---

Last Date of Exposure: ---

**Monitoring Event Notes**

Thum Belina is suffering from XYZ disease and is at high risk of infection - continue monitoring and confirm test results

Household note from NC COVID snake household

**Timeline / Activities**

Timeline

Search timeline

Enter a note...

Note modified by Jahnvi Parikh  
Chronic Condition  
Thum Belina is suffering from XYZ disease and is at high risk of infection - contin...  
3/22/2021 12:00 PM

Phone Call from Jahnvi Parikh  
Initial Outreach / Unanswered  
Closed  
3/22/2021 11:59 AM

Task modified by Jahnvi Parikh  
Follow up  
Active  
3/22/2021 11:58 AM

Each **contact profile**, or **monitoring event**, represents a **single, continuous monitoring period** following exposure to COVID-19. This may include exposure to more than one case patient and/or extend beyond the duration of an initial quarantine period. When a contact concludes a monitoring period, their profile is closed and deactivated. Review the [Entering a Contact Micro-Training](#) and [materials](#) for detailed instructions on entering contacts, and see the [Handling Multiple Exposures Job Aid](#) for more information on creating a new monitoring event if a contact is re-exposed after concluding monitoring.

### 1. Record Information:

- **Contact or Case Patient:** Indicates if the individual is *entering* the system as a contact or as a case patient. This field is mandatory and locks on the first time that a profile is saved (per the [Case Patients Job Aid](#)).
- **C#:** Contact Number, a unique identifier automatically generated by the system.
- **Event #:** Monitoring event # that increases by 1 each time a contact is cloned (per the [Handling Multiple Exposures Job Aid](#)).
- **Case-Patient NC COVID Event ID:** Indicates the NC COVID Event ID of the individual to whom the profile belongs if they have tested positive and are a case. If "Contact" is selected in the "Contact or Case Patient" field, this field displays a clickable lightbulb that reminds users to leave this field blank, as it displays the Event ID of the individual to whom this profile belongs, *not* of their source patient.

## 2. Basic Info:

- **Priority Contact or Case:** This feature allows an individual to be tagged as a high priority for manual outreach. Check with local guidance to determine if this toggle should be used.
- **First Name:** First name of the contact. Required to create contact profile.
- **Middle Name:** Middle name of the contact. Not required.
- **Last Name:** Last name of the contact. Required to create contact profile.
- **Preferred Name:** Contact's preferred name. Not required.
- **Date of Birth:** Contact's exact date of birth, if known. Required in order to select "Yes" in the "Begin Monitoring?" field, which triggers digital outreach.
- **Fake DOB:** Indicates if contact's DOB is a placeholder. If this is turned on and saved, "Calculated Age" will not be populated.
- **Is Minor:** Indicates if contact is under age 18.
- **Household:** Used to link a contact with an existing [household](#).
- **Household Relationship:** Used to indicate a contact's relationship to others in their household.
- **Requires Proxy:** Indicates whether a contact completes their own assessments or requires a proxy (e.g., parent completing assessment for minor under 13).

**Thum Belina**  
Contact

ARIAS Contact Assessments All Activities Recent Monitoring History System Information Related

**Record Information**

Contact or Case Patient	Contact
C#	C-0000063234
Event #	1
Case-Patient NC-COVID Event ID	

**Basic Info**

Priority Contact or Case ☐ No

First Name \* Thum

Middle Name ---

Last Name \* Belina

Preferred Name ---

Date of Birth (DOB) \* 2/18/2000

Fake DOB ☐ No

Is Minor ☐ No

Household ---

Household Relationship ---

Requires Proxy ☐ No

**Monitoring Details**

Begin Monitoring? Yes

Monitoring Status Monitoring

Monitoring End Date 3/9/2021

Final Monitoring Outcome Monitored in Other System

Monitoring Age 25

Begin Monitoring Date 2/25/2021

Last Assessment Date 2/25/2021 2:43 PM

First Date Symptoms Reported ---

Most Recent Date Resource Need Reported ---

**Source Case Information**

Ongoing Exposure ☐ No

NC-COVID Event ID of Source Patient #1 (Use the number) 123445566

Last Date of Exposure to Source Patient #1 2/23/2021

NC-COVID Event ID of Source Patient #2 (Use the number) ---

Last Date of Exposure ---

**Monitoring Event Notes**

Thum Belina is suffering from XYZ disease and is at high risk of infection - continue monitoring and confirm test results

Household note from NC COVID snake household

**Timeline / Activities**

Timeline

Search timeline

Enter a note...

Note modified by Jahnavi Parikh  
Chronic Condition  
Thum Belina is suffering from XYZ disease and is at high risk of infection - continue monitoring and confirm test results  
3/22/2021 12:00 PM

Phone Call from Jahnavi Parikh  
Initial Outreach / Unanswered  
Closed  
3/22/2021 11:59 AM

Task modified by Jahnavi Parikh  
Follow up  
Active  
3/22/2021 11:58 AM

## 3. Monitoring Details: Used after contact entry when monitoring begins.

- **Begin Monitoring?:** Turns on automatic digital (text or email) outreach when set to "Yes" (if "Monitoring Status" is set to "Monitoring"). Review the [Beginning Monitoring & Assessments Micro-training](#) and [materials](#) for details.

- **Monitoring Status:** Indicates if contact is being monitored, has opted out, or has concluded or paused monitoring.
  - **Monitoring End Date:** Automatically calculated as 14 days since a contact's last date of exposure unless manually updated by tracer. Determines end of digital monitoring as well as the end-of-quarantine date sent to contact in an automatic digital exposure notification.
  - **Final Monitoring Outcome:** Indicates a contact's status at the conclusion of monitoring. See the Closing Out a Contact [job aid](#) for an explanation of outcomes and when they are used.
  - **Monitoring Age:** Locked field that shows how many days a contact has been monitored, automatically calculating days since "Begin Monitoring?" was set to "Yes." For example, a "Monitoring Age" of 5 means that the contact has been monitored for 5 days.
  - **Begin Monitoring Date:** Locked field that automatically calculates the date "Begin Monitoring?" was set to "Yes."
  - **Last Assessment Date:** Locked field that automatically calculates the date of the last submitted [assessment](#) in which the "Agreement" field was completed.
  - **First Date Symptoms Reported:** Locked field that updates to alert tracer to review assessment on the first occasion that a contact [reports a symptom](#). Only updates one time.
  - **Most Recent Date Resource Need Reported:** Locked field that updates to alert tracer to review the assessment each time a contact [reports a new resource need](#).
4. **Monitoring Event Notes:** Free text box for any reference information that should remain easily visible at the top of a contact's profile.
- **Household Notes:** Locked field that automatically flows into CCTO with information entered into its counterpart field in NC COVID. Used to detail a contact's household information. Only appears if populated.
5. **Timeline/Activities:** Used to schedule and record monitoring, outreach, and reference information [per the job aid](#) and [micro-training](#).
- **Phone Call:** Item that logs or schedules attempted or completed phone calls.
  - **Task:** Item that logs or schedules all other monitoring activities, such as the review of digital assessments or planned escalations.
  - **Note:** Item that records reference information, such as chronic conditions. Key information entered in this field can also be pasted into the *Monitoring Event Notes* box for increased visibility as needed.

<p>Middle Name ---</p> <p>Last Name * Belina</p> <p>Preferred Name ---</p> <p>Date of Birth (DOB) * 2/18/2000</p> <p>Fake DOB <input type="checkbox"/> No</p> <p>Is Minor <input type="checkbox"/> No</p> <p>Household ---</p> <p>Household Relationship ---</p> <p>Requires Proxy <input type="checkbox"/> No</p>	<p>Source Case Information</p> <p>Ongoing Exposure <input type="checkbox"/> No</p> <p>NC-COVID Event ID of Source Patient #1 (Use the number) 123445566</p> <p>Last Date of Exposure to Source Patient #1 2/23/2021</p> <p>NC-COVID Event ID of Source Patient #2 (Use the number) ---</p> <p>Last Date of Exposure to Source Patient #2 ---</p> <p>Source Patient Name ---</p> <p>Source Patient Birthdate ---</p>
<p>Contact Information</p> <p>Country Code 1</p> <p>Primary Phone (will be used for text messages) 1-222-333-4445</p> <p>Phone #2 ---</p> <p>Phone #3 ---</p> <p>Email * thum.teeny@belina.com</p> <p>Preferred Method of Contact * Email</p>	<p>Testing Details</p> <p>Referred to Test? Yes</p> <p>Referred to Test Date 3/2/2021</p> <p>Tested? Yes</p> <p>Test Date 3/4/2021</p> <p>COVID-19 Test Result Negative</p>

Vaccination

## 6. Contact Information:

- **Country Code:** Indicates if contact has a non-US country code. Not usually needed.
- **Primary Phone:** Contact's primary phone number, which should be their mobile phone, if available. Automated texts will always be sent to this number.
- **Phone #2, #3:** Contact's secondary phone numbers, such as work or landlines.
- **Email:** Contact's email address.
- **Preferred Method of Contact:** Determines how contact will be reached or how automatic digital outreach will be sent. This will be set to "Phone Call" by default until manually changed, and must read "Text Message" or "Email" in order to send a digital [assessment](#).

## 7. Source Case Info:

- **Ongoing Exposure:** Indicates if a contact's last date of exposure is ongoing (e.g., if contact lives with case patient).
- **NC-COVID Event ID of Source Patient #1:** 9-digit NC-COVID Event ID of case patient to whom contact was exposed. This number must start with a "1."
- **Last Date of Exposure to Source Patient #1:** Last date when contact was exposed to case patient. Used by the system to calculate ["Monitoring End Date"](#) and the [recommended testing date](#) sent to the contact in an automatic digital exposure notification.
- **NC-COVID Event ID of Source Patient #2:** Used if contact has a new exposure while being monitored. See [Handling Multiple Exposures Job Aid](#).



- **Last Date of Exposure to Source Patient #2:** Used if contact has a new exposure while being monitored. See [Handling Multiple Exposures Job Aid](#).
- **Source Patient Name:** Used only if NC-COVID Event ID is unavailable.
- **Source Patient Birthdate:** Used only if NC-COVID Event ID is unavailable.

## 8. **Testing Details:** Section to be filled out manually by the contact tracer.

- **Referred to Test?:** Indicates if contact has been referred to testing.
- **Referred to Test Date:** Manual field to indicate date of contact's test referral.
- **Tested?:** Indicates if contact is confirmed to have been tested.
- **Test Date:** Manual field to indicate date of contact's test.
- **COVID-19 Test Result:** Indicates outcome of contact's test.
- **NC COVID Diagnosis Date:** Locked field populated automatically from NC COVID that is only shown for case patients who have flowed into CCTO.

**Anna Arendelle**  
Contact - MDA Form

**CCTO Contact** Assessments All Activities Recent Monitoring History Referrals System Information Related

**Address**

Address Line 1	Castle of Arendelle
Address Line 2	Suite 20
City	Raleigh
State	NC - North Carolina
Postal Code	27515
County	Wake

**Personal Info**

Employer	Kingdom of Arendelle
Job Title	Princess
Preferred language	English

**Demographic Info**

Is Student	No
------------	----

**Contact Reported Testing**

Test Date	---
Test Location	---
Test Results	Positive

**Vaccination**

Vaccine - 1st Dose	Pfizer-BioNTech (195 MDV) COVID-19 Vaccine
Vaccine Date - 1st Dose	4/16/2021
Vaccine - 1st Dose Confirmed in CVMS?	No
Vaccine - 2nd Dose	---
Vaccine Date - 2nd Dose	---
Vaccine - 2nd Dose Confirmed in CVMS?	No
Vaccine Communication Preference	Would like future calls and texts about vaccines

## 9. **Address:**

- **Address Line 1, 2:** Contact's street address.
- **City:** City of contact.
- **State:** State of contact. Required to create contact profile.
- **Postal Code:** Postal code of contact.
- **County:** County of contact. Required to create contact profile if the contact resides in NC. *Use county of case if county of contact is not known.*

## 10. **Contact Reported Testing:** Section appears only if the contact completes this information in an [assessment](#). Contains locked fields that automatically populate with information provided by the contact.



- **Test Date:** Contact-reported date of testing.
- **Test Location:** Contact-reported location of testing.
- **Test Results:** Contact-reported results of the test.

## 11. Vaccination:

- **Vaccine - 1<sup>st</sup> Dose:** Manual field that indicates which classification of vaccine was administered to the contact for their first dose.
- **Vaccine Date - 1<sup>st</sup> Dose:** Manual field for the date when the first dose of the vaccine was administered to the contact.
- **Vaccine - 1<sup>st</sup> Dose Confirmed in CVMS?:** Toggle indicating whether the information entered in "Vaccine Type" and "Vaccine Date" 1<sup>st</sup> Dose fields has been cross-checked with CVMS per local protocol.
- **Vaccine - 2<sup>nd</sup> Dose:** Manual field that indicates which classification of vaccine was administered to the contact for their second dose.
- **Vaccine Date - 2<sup>nd</sup> Dose:** Manual field for the date when the second dose of the vaccine was administered to the contact.
- **Vaccine - 2<sup>nd</sup> Dose Confirmed in CVMS?:** Toggle indicating whether the information entered in "Vaccine Type" and "Vaccine Date" 2<sup>nd</sup> Dose fields has been cross-checked with CVMS per local protocol.
- **Vaccine Communication Preference:** Automatically updates each time a [vaccine referral with a new preference is logged](#) and can also be updated manually.

The screenshot displays the ARIAS Contact profile for Thum Belina. The interface includes a top navigation bar with tabs: ARIAS Contact, Assessments, All Activities, Recent Monitoring History, System Information, and Related. The main content area is divided into several sections:

- Personal Info (12):** A section containing fields for Employer (Tiny Homes LLC), Job Title (Builder), Preferred language (Other), and Other Preferred Language (Finnish).
- Demographic Info (13):** A section containing fields for Is Student (No), Calculated Age (21), Manual Age (if DOB is not available) (---), Gender (Female), Race (Unknown), and Ethnicity (Unknown).
- Text Communication Info (14):** A section containing a toggle for Send Notification (Yes), Notification Status (delivered), Notification Status Date (12/23/2020 2:13 PM), Send Vaccine Communication (xxx), Vaccine Communication Text Status (delivered), and Vaccine Communication Status Date (3/19/2021 1:11 PM).

Red boxes and numbers 12, 13, and 14 highlight the Personal Info, Demographic Info, and Text Communication Info sections, respectively.

## 12. Personal Info:

- **Employer:** Contact's employer. Do not use for school information.

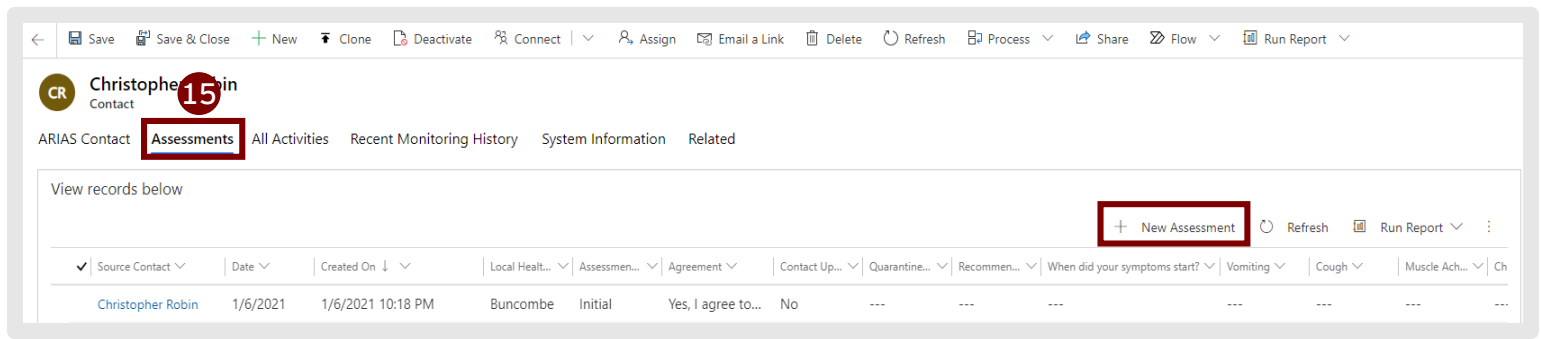
- **Job Title:** Contact's job title.
- **Preferred Language:** Contact's primary language. Determines if automatic outreach is sent in English or Spanish.
- **Other Preferred Language:** Used to type the name of contact's primary language only if "Other" is selected in "Preferred Language." Appears if "Other" is selected in Preferred Language.

### 13. Demographic Info:

- **Is Student:** Indicates if contact is a student.
- **School Name:** Contact's school (*or pre-school, daycare, etc. if permitted by local protocol*). Appears if "Is Student" is turned on.
- **Calculated Age:** Locked field that automatically calculates contact's age based on "Date of Birth."
- **Manual Age:** Manual field to input contact's age if DOB is not available.
- **Gender:** Contact's gender.
- **Race:** Contact's race.
- **Ethnicity:** Contact's ethnicity.

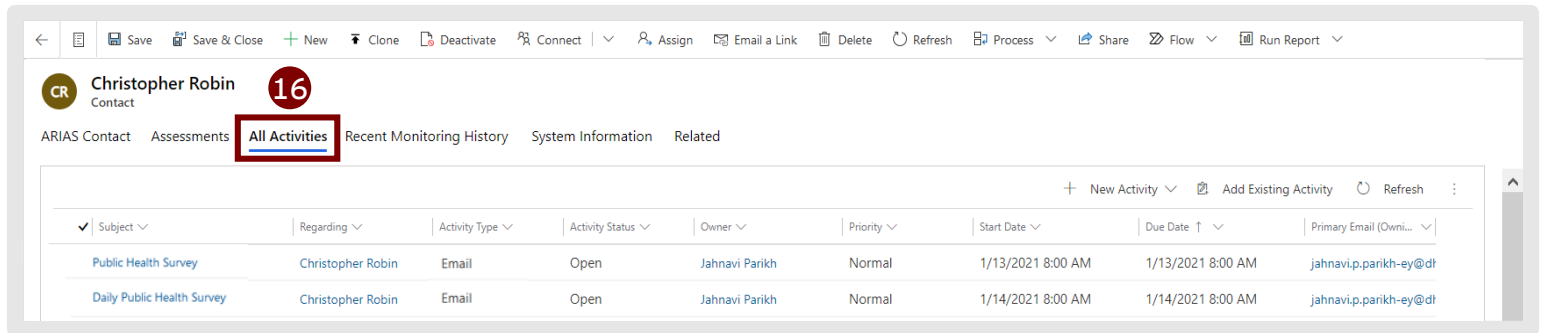
### 14. Text Communications Info:

- **Send Notification?:** Automatic toggle that moves to "Yes" once the fields required for notification ("Last Date of Exposure" for contacts; "Email" or "Primary Phone" for both contacts and cases) are complete, indicating that the system will send an automatic notification upon saving. See job aids for [Digital Exposure Notification for Contacts](#) and [Verifying Case Flow and Notification](#).
- **Text Notification Status:** Locked field that shows a snapshot of text notification status as of the time shown in "Status Date." Only updates one time. See [Digital Exposure Notification for Contacts](#) or [Verifying Case Flow and Notification one-pager](#) for descriptions of statuses.
- **Status Date:** Locked field for the timestamp of "Text Notification Status." Only updates one time.
- **Send Vaccine Communication:** Locked field used only by the NC DHHS IT Team to support the text blast functionality. CCTO users cannot use or change this field.
- **Vaccine Communication Text Status:** Locked field that shows a snapshot of text blast status as of the time shown in "Vaccine Communication Status Date." Updates each time a new text blast is sent.
- **Vaccine Communication Status Date:** Locked field for the timestamp of "Vaccine Communication Text Status." Updates each time a new text blast is sent.

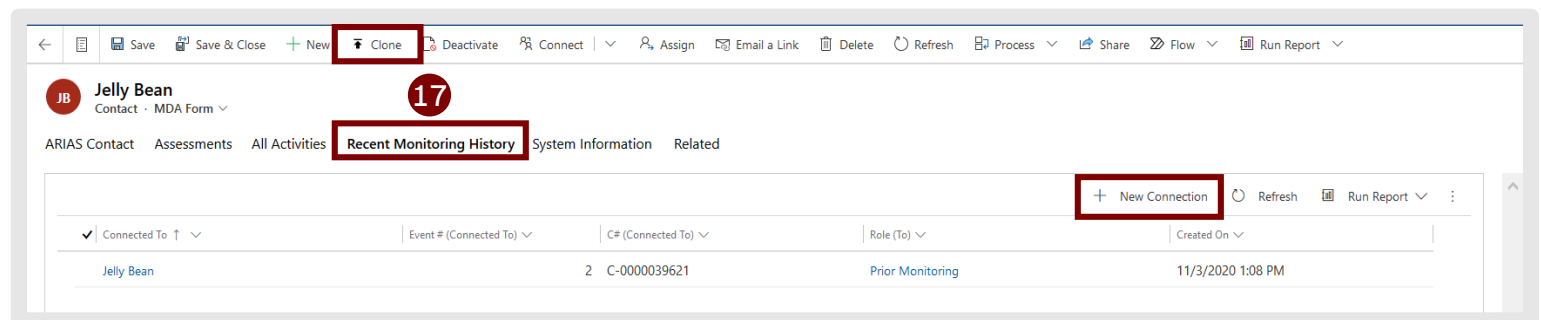


**15. Assessments Page:** Displays all [assessments](#) (ongoing surveys of changes in symptoms and resource needs) for this contact.

- **+New Assessment Button:** Creates a new [manual assessment](#) for the contact in which results are recorded by the tracer over the phone.



**16. All Activities Page:** Displays copies of all automated outreach (emails, texts) that has been sent to a contact, including items from automatic digital notifications and ongoing digital monitoring.



**17. Recent Monitoring History Page:** Shows the monitoring events immediately before and (if applicable) immediately following this monitoring event.

- **Clone Button:** Creates a new monitoring event under the same C# from a *deactivated profile only*. See the [Handling Multiple Exposures](#), [Quick Reference Handling and Preventing Duplicates](#), and the [Cloning, Connecting, Deduplicating](#) Job Aids for more information on how and when to use this feature.
- **+ New Connection:** Links non-concurrent monitoring events for the same individual when cloning is not an option because a new monitoring event has already been created under a different C#. See the [Connecting Contacts](#) and [Cloning, Connecting, Deduplicating](#) job aids for more information on how and when to use this feature.

18

Christopher Robin  
Contact

ARIAS Contact Assessments All Activities Recent Monitoring History **System Information** Related

Local Health District Information	
County (Text)	Buncombe
Region	2
Local Health Department	Buncombe
State/Province	NC

Modified	
Modified On	2/11/2021 6:00 PM
Modified By	Jahnavi Parikh
Created On	1/6/2021 5:18 PM
Created By	Jahnavi Parikh
Owner	Jahnavi Parikh

Status	
Status	Active
Status Reason	Active
Cloned	No
Cloned Record GUID	---

System First Outreach Date	2/4/2021 2:53 PM
System First Outreach Method	Phone Call
Manual First Outreach Date	---
Manual First Outreach Method	---
First Phone Call	2/4/2021 2:53 PM
Most Recent Phone Call	2/8/2021 3:25 PM
Hours To First Phone Call	5

**18. System Information Page:** Displays information about the contact profile that has been automatically recorded by the system for your reference.

- **System First Outreach Date, Method:** Locked fields that automatically calculate based on the first completed outreach attempt (phone call, text message, or email) in Timeline/Activities.
- **Manual First Outreach Date, Method:** Manual fields that can be used to record the date and method of first outreach attempt for organizations in which this is required. Not generally used.
- **First Phone Call:** Locked field that automatically updates one time based on the first completed phone call, whether or not this is a contact's first outreach.
- **Most Recent Phone Call:** Locked field that automatically updates every time a new phone call is completed.
- **Hours to First Phone Call:** Locked field that automatically calculates the time from profile creation to the time when the first phone call logged on the contact record was closed.
- **Cloned:** Indicates if this monitoring event was created through cloning a deactivated profile for a previous monitoring event. This field will read "No" for all active profiles and "Yes" for any deactivated profiles that have been cloned to create new monitoring events. See the [Cloning, Connecting, Deduplicating](#) and [Handling Multiple Exposures](#) Job Aids.

SaveSave & CloseNewCloneDeactivateConnectAssignEmail a LinkDeleteRefreshCheck AccessProcessShareFlowRun Report

RR

Rowena Ravenclaw

Contact · MDA Form

CCTO Contact

Assessments

All Activities

Recent Monitoring History

Referrals

System Information

Related

+ New Referral

Refresh

Run Report

Referra...	Referral Date	Source Contact	County (Source Cont...	Type of Campaign (...)	C#	Type of Communication	Communication Preferences	Created On	Created By	Agency
Vaccine	4/21/2021	Rowena Ravenclaw	Buncombe	Awareness	C-0000990396	Outreach Call	Prefers only texts about v...	4/21/2021 10...	Jahnvi Par	
Vaccine	4/27/2021	Rowena Ravenclaw	Buncombe	Specific Event	C-0000990396	Outreach Call	Would like future calls an...	4/27/2021 3:0...	Jahnvi Par	

**19. Referrals Page:** Displays all [referrals](#) created for this individual.

- **+New Referral Button:** Creates a new [referral](#) within the profile using pre-populated information from the individual's profile.



# Views

Household	Household note	Primary Phone	Monitoring...	Preferred la...	Priority Co...	Preferred ...	Is Minor	Is Student	School Na...	Owner
11:20 All Variables					No	Phone Call	No	No		Mary Moran
All My Contacts					No	Phone Call	No	No		Mary Moran
Dare Contacts					No	Phone Call	No	No		Mary Moran
System Views					No	Phone Call	No	No		Mary Moran
My Active Contacts & Cases		5554445454		English	Yes	Email	No	No		Mary Moran
Active Contacts					No	Phone Call	No	No		Mary Moran
Active Monitored Contacts					No	Phone Call	No	No		Mary Moran
All Cases					No	Phone Call	No	No		Mary Moran
All Cases Imported from NC COVID					No	Phone Call	No	No		Mary Moran
All Contacts					Yes	Phone Call	No	No		Mary Moran
All Contacts & Cases					No	Phone Call	No	No		Mary Moran
All Contacts Imported from NC-COVID		1-333-222-3232			Yes	Phone Call	No	No		Mary Moran
All Monitoring Events		5556667788			Yes	Email	No	No		Mary Moran
Inactive Contacts		5556687878		English	Yes	Email	No	Yes	Hogwarts	Mary Moran
Inactive Monitored Contacts		5556687878		English	Yes	Email	No	Yes	Hogwarts	Mary Moran
My Inactive Contacts		5556687878		English	Yes	Email	No	Yes	Hogwarts	Mary Moran
My Team's Active Cases		5556687878		English	Yes	Email	No	Yes	Hogwarts	Mary Moran
C-000006... Martin	Dino	5557778888			No	Phone Call	No	No		Mary Moran
C-000006... Mite	Dino	5557778888			No	Phone Call	No	No		Mary Moran
C-000006... Sam	Dino	5557778888			No	Phone Call	No	No		Mary Moran

A **view**, such as the default “My Active Contacts and Cases” view on the Contacts Tab, is a way of looking at the set of data displayed within each tab. Views use **filters** to limit the entries displayed and **columns** to change the information displayed about those entries. Views can be developed or shared by others, and you can also develop and save your own views per the [job aid](#) and the [training](#).

1. **Views Dropdown:** Displays a list of all views available to the current user. Views are options within a tab that change the way information is filtered or displayed. A view may add or remove filters on data (such as a filter for owner or county) or change the type or order of [columns](#) displayed.
2. **My Views:** A list of views created by the user (“personal views”) and views shared with the user by other users of CCTO.
3. **System Views:** A list of default views automatically available to all users of CCTO.
4. **All Contacts and Cases:** A system view that displays only the most recent monitoring event (active or inactive) for all contacts and cases.
5. **All Monitoring Events:** A system view that displays a list of all monitoring events for all contacts and cases. See [Multiple Exposures Job Aid](#) for more information.

6. **My Inactive Contacts:** A system view that displays a list of all contact profiles owned by the user that have been deactivated.
7. **Create View Button:** Opens a system dialogue that allows the user to create and share personal views [per the job aid](#).
8. **Filter Icon:** Opens a panel that displays all filters applied to the current view and allows users to add or remove filters.





**Glass Family**  
Household

Summary | Household Members | System Information | Related

**HOUSEHOLD INFORMATION**

H# H-0000001200

Household Name \* Glass Family

Primary Contact George Glass

Preferred Language English

**Source Case Info**

NC-COVID Event ID of Source Patient #1 101222333

Last Date of Exposure to Source Patient #1 9/13/2020

Ongoing Exposure No

NC-COVID Event ID of Source Patient #2

Last Date of Exposure to Source Patient #2

Source Patient Name

**Contact Information**

Country Code ---

Mobile Phone (will be used for text messages) 1-555-444-3333

Phone #2 ---

Phone #3 ---

Email ---

Preferred Method of Contact Phone Call

**ADDRESS**

Street 1 124 Street Lane

Street 2 ---

City Duck

State

**Monitoring Event Notes**

---

**Timeline**

Search timeline

Enter a note...

Note modified by Cathy Chumbley  
Household info  
02/07/2021 Cheyanne is the positive case, she is not isol...  
2/7/2021 4:33 PM

A **household** is a joint profile that links a group of contacts to help streamline data entry and outreach. Information entered in **Source Case Information**, **Contact Information**, and **Address** will carry over to new contacts created within this household; however, this information can always be adjusted on individual contact profiles later. For more information on navigating households, see [this job aid](#).

## 1. Household Information:

- **H#:** Household number, a unique identifier automatically generated by the system.
- **Household Name:** An identifying group name used for the entire household.
- **Primary Contact:** The main individual to whom the contact tracer should speak when contacting this group. This individual may have been designated to complete assessments on behalf of others.
- **Preferred Language:** The primary language spoken by members of this household.

2. **Monitoring Event Notes:** This section serves as a free text box for any reference information that should remain easily visible at the top of the household profile.

**GF** Glass Family Household

Summary **Household Members** System Information Related

**3** [+ New Contact](#) Refresh Run Report

✓	Last Name	First Name	Household	Primary Phone	Monitoring Status	Preferred la...	Needs a Ph...	Preferred Method of Contact	Is Minor	Is Student	School Na...	Owner	Last Assessment Date
	Glass	Georgette	Glass Family	1-555-444-3333	Monitoring Paused	English	---	Phone Call	No	No	---	Mary Moran	---
	Glass	George	Glass Family	1-444-333-5555	Monitoring Paused	English	---	Phone Call	No	Yes	Westdale ...	Mary Moran	---

3. **Household Members Page:** Lists all contacts within a household. Each contact within a household must have their contact profile and receive their own assessments.
- **+New Contact Button:** Creates a new contact within the household using pre-populated information from the household profile.



**A-0000466804**  
Assessment

Assessment | Notification Contact Info | Suggested Exposures | System Information | Related

**Basic Info**

Source Contact: Christopher Robin

C#: C-0000054480

**Details**

Assessment Type: Initial

Agreement: Yes, I agree to participate.

Agreement/Disagreement Date: 1/6/2021

**Covid-19 Test Results**

Have you received a Covid-19 test result? Yes

Test Date: 1/11/2021

Test Location: Walgreens

Test Results: Positive

**Symptoms**

Fever	No
Highest temperature in the past 24 hours	---
Sweats	No
Chills	No
Headache	Yes
Muscle Aches	Yes
Sore Throat	Yes
Cough	Yes
Loss of Smell or Taste	No
Shortness of Breath/Difficulty Breathing	Yes
Stomach Pain or Cramps	No
Vomiting	No
Diarrhea	No
Other Symptoms:	---
When did your symptoms start?	1/8/2021

**Additional Questions**

Access to Phone or Computer?	Yes
Do you have a face covering at home with you?	Yes
Able to remain in your home without guests during quarantine?	Yes
Do you have the ability to isolate yourself within your home away from others?	Yes
Do you have any household members that are high risk for ...	No
Do you have someone that could run errands and get ...	Yes
Do you have a primary care provider?	Yes
Other Resource Needs	---
Is there any other information you would like to provide?	---

An **assessment** is an ongoing survey of changes in symptoms and resource needs. These could be completed by the contact in a **digital assessment** (delivered to a contact via text or email) or recorded by the tracer in a **manual assessment** (completed by the tracer while speaking to the contact on the phone). See the [Assessments Job Aid](#) or [micro-training video](#) for details.

### 1. Details:

- **Assessment Type:** Indicates if this is an initial, monitoring, or notification assessment. Notification assessments are sent within automatic digital notifications and contain a unique set of information (see [next page](#)). Both initial and monitoring assessments collect the same symptom and test result information; however, initial assessments display a full list of resource need questions, while monitoring assessments ask contacts: "Do you have a new resource need?" and only request more info if contacts respond "Yes."
- **Agreement:** Indicates whether the contact has agreed to participate and is used to calculate "Last Assessment Date."
- **Agreement/Disagreement Date:** Locked field that automatically populates based upon the first date that "Agreement" field is populated.

### 2. Covid-19 Test Results:

Allows the contact to self-report testing information that will automatically transfer to the [Contact Reported Testing](#) box on a contact profile.

3. **Symptoms:** Corresponds with the symptom questions presented to contacts in digital assessments. The first time any field in this section except “Other Symptoms” or “Highest temperature in the past 24 hours” is completed, the contact profile field for “First Date Symptoms Reported” will update.
4. **Additional Questions:** Corresponds with the resource need questions presented to contacts in digital assessments and will present a shortened list of questions if “Assessment Type” is “Monitoring.” Each time any field in this section except “Is there any other information you would like to provide?” is updated, the contact profile field for “Most Recent Date Resource Need Reported” will update.

A-0000483174 5

Assessment

Assessment Notification Contact Info Suggested Exposures System Information Related

<p><b>Contact Provided Information</b></p> <p>🔒 First Name <b>Gandalf</b></p> <p>Middle Name <b>MiddleName</b></p> <p>🔒 Last Name <b>the Grey</b></p> <p>🔒 Date of Birth (DOB) 12/31/2000</p> <p>🔒 Primary Phone Number ---</p> <p>🔒 Email Gandalf@wizard.com</p> <p>🔒 Preferred Language English</p>	<p><b>Original Contact Information</b></p> <p>🔒 First Name <b>Gandalf 21</b></p> <p>Middle Name <b>21</b></p> <p>🔒 Last Name <b>the Grey</b></p> <p>🔒 Date of Birth (DOB) 12/31/2000</p> <p>🔒 Primary Phone Number 1-984-444-7587</p> <p>🔒 Email george.r.joyner@dhhs.nc.gov</p> <p>🔒 Preferred Language ---</p>	<p>🔒 Preferred Method of Contact <b>Email</b></p> <p>🔒 Contact Updated? <b>Yes</b></p> <p>🔒 Quarantine end date 1/29/2021</p> <p>🔒 Recommended Test Date 1/20/2021</p> <p>Reviewed &amp; wrong person <b>No</b></p>
<p><b>Contact Provided Address</b></p> <p>🔒 Address Line 1 <b>123 Middle St</b></p> <p>🔒 Address Line 2 ---</p> <p>🔒 City <b>Middle Earth</b></p> <p>🔒 County  <b>Rockingham</b></p>	<p><b>Original Address Information</b></p> <p>🔒 Address Line 1 ---</p> <p>🔒 Address Line 2 ---</p> <p>🔒 City ---</p> <p>🔒 County <b>Rockingham</b></p>	

5. **Notification Contact Info:** For notification assessments only, shows the information submitted by a contact through the notification portal. Will be blank on monitoring and initial assessments. See the [Digital Exposure Notification job aid](#) for more information.
  - **Contact Provided Info, Address, Demographics:** Locked fields that show contact's submitted responses within the digital exposure notification portal.
  - **Original Contact Info, Address, Demographics:** Locked fields that show the original data in contact's profile prior to contact's submitted responses in the portal.
  - **Contact Updated?:** Locked field that reads “Yes” if contact-provided last name and original last name are an exact match, indicating that all contact-provided responses have transferred automatically onto profile. *In the event of a mismatch, see page 5 of the [job aid](#).*

- **Quarantine End Date:** Locked field that displays the quarantine end date sent to the contact in their automatic notification (based on [“Monitoring End Date”](#)).
- **Recommended Test Date:** Locked field that displays the recommended test date sent to the contact in their automatic notification (based on [“Last Date of Exposure”](#)).
- **Reviewed & Wrong Person:** Manual field that can be updated to “Yes” per local process if it is determined a notification was received by someone other than the intended contact.



← Save Save & Close + New Deactivate Delete Refresh Check Access Assign Share Email a Link Flow Run Report

### New Referral

Referral

General Related

Basic Info

R# R-0000001031

Source Contact \* Frog Legs

Details

Referral Type \* Resource

Referral Date \* 4/27/2021

Details

Type of Communication Outreach Call

Type of Campaign Specific Request

Referral Need Food Assistance, Individual & Family Support

Outcome of Referral (if known) ---

Communication Preferences Would like future calls and texts about resources available

Notes from Referral ---

Referred To:

Agency ---

Agent Name ---

How Referred ---

**Referrals** are a type of record connected to contact/case profiles and used as part of the documentation process for vaccine, resource, and other referral conversations. A referral is not a replacement for a phone call being logged in Timeline/Activities, and it should be logged in addition to the phone call that took place. For more details and guidance regarding referrals, please review the [Quick Reference: Referrals](#) job aid.

## 1. Basic Info:

- **R#:** A unique identifier that populates upon saving.
- **Source Contact:** Locked field that automatically populates with the name of the contact or case for whom this referral is being logged.

## 2. Details:

- **Referral Type:** This field can be selected to “Vaccine,” “Resource,” or “Other” and indicates which category of referral is being logged. Each option will produce unique fields pertaining specifically to each individual referral type.
- **Referral Date:** Automatically populates based upon the time the referral was created.
- **Type of Communication:** Indicates what type of call is being made. See the [Quick Reference: Referrals Job Aid](#) for an explanation of communication types and when they are used. This field is used in all referral types.

- **Type of Campaign:** Indicates the context of the referral. See the Quick Reference: Referrals [job aid](#) for an explanation of campaign types and when they are used. This field is used in all referral types.
- **Outcome of Referral:** Indicates the final status of the referral. This field will display different options depending on the selection in Referral Type.
- **Communication Preferences:** Indicates how the individual would like to be contacted. For vaccine referrals, field will also update the [“Vaccine Communication Preference”](#) field in the individual’s contact profile; the profile field can also be updated manually but will automatically update each time a referral with a new preference is logged.
- **Notes from Referral:** This section serves as a free text box for any information regarding the referral that should remain easily visible.

3. **Referred To:** This box appears only if “Resource” is selected as the referral type, along with the following fields:

- **Agency:** Indicates the type of organization to which the individual has been referred. Selecting “Local Resource” will produce a free text field for the name of the local resource.
- **Agent Name:** A free text field that indicates the name of the individual to whom this case or contact has been referred.
- **How Referred:** Lists the process used for the referral. Selecting “Other” will produce a free text field.